Helpful Hints: How to Maintain One Practice Schedule In A Customer Folder In the National Conservation Planning Database

The following are helpful hints to maintain one practice schedule in each customer folder for the National Conservation Planning Database (NCPDB) to ensure data integrity. The hints include these categories:

1. **How to revise an existing practice schedule and create a new plan report and/or contract**
2. **When creating a new customer, how to include all programs in one practice schedule and create a new plan report and/or contract**
3. **How to delete duplicate practice schedules**
4. **How to delete duplicate customer folders**
5. **How to rename a customer folder**
6. **How to rename a customer plan**

1. How to revise an existing practice schedule and create a new plan report and/or contract

Remember, a plan revision is an action needed as a result of significant changes in one or more of the conservation systems defined in the conservation plan. This may be caused by changes in land use, changes in technology, changes in the set of practices included in the system, a change in the land units treated by the system, etc. The product is a revised plan. Plan revisions are not done just because you don't like what the previous employee completed in CST. The revision will be completed utilizing the current practice schedule and planned land units. DO NOT MAKE A NEW PRACTICE SCHEDULE OR PLANNED LAND UNIT LAYER! A situation that would require a plan revision would be a customer entering a program, such as CREP, where there would be a change in the land use.

1. The Customer must be checked out on your **C: drive**.
2. Open the customer folder.
3. Since this is a plan revision, click the **Reporting** tab and change the plan approval date.
4. Click on the **Practice Schedule** tab and edit existing practices in the practice schedule. **DO NOT go to ArcMap and begin changing field numbers or deleting fields until you make the appropriate changes in the practice schedule.** First, complete the actions outlined below for deleting and renumbering fields before

making any changes in ArcMap. If you do not follow the directions, you will end up with many errors in the PRS "error report".

a. Deleting Fields: If you intend to delete any existing land units that have practices already planned and/or applied, FIRST, open up the practice schedule and delete the practices.

   (Note: If a practice is "grayed out", because it has been previously reported as both planned and applied, you must check the customer back into the NCPDB. Next, open PRS and open the plan. Go to the ***Practices*** *tab and click on the practice name. In the dialog box that appears, click on the delete button in the lower right corner. This deletes the practice so that it will no longer be a part of this plan. The customer can then be checked back out in Toolkit, to continue with the planning process.)*

   Go back to the map (planned land unit layer) and edit the land unit, deleting the field(s). Follow up with a review of the practices in the practice schedule.

b. Renumbering Fields: If you intend to renumber any existing land units that have practices already planned and/or applied, FIRST, open up the practice schedule and place the new field number for each practice. Follow up with a review of the practices in the practice schedule.

   (Note: If a practice is "grayed out" in the practice schedule, because it has been previously reported as both planned and applied, the customer must be checked back into the NCPDB. Next, open PRS and then open the plan. Go to the ***Practices*** *tab and click on the practice name that needs to be changed or deleted. Click on the delete command button in the lower right corner. This deletes the practice so that it will no longer be a part of this plan. The customer can then be checked back out in Toolkit, to continue with the planning process.)*

   Next, go to ArcMap and edit the planned land unit layer and re-attribute the fields that are to have different numbers

c. Consequences of deleting or renumbering fields before editing the practice schedule: If you do not follow the directions above and delete or renumber fields in the planned land unit layer first, the practices in the practice schedule for the fields with the old numbers can disappear from your view. They do not however, disappear from the NCPDB. They become practices with no field and no Latitude/Longitude and will appear in the PRS error report.

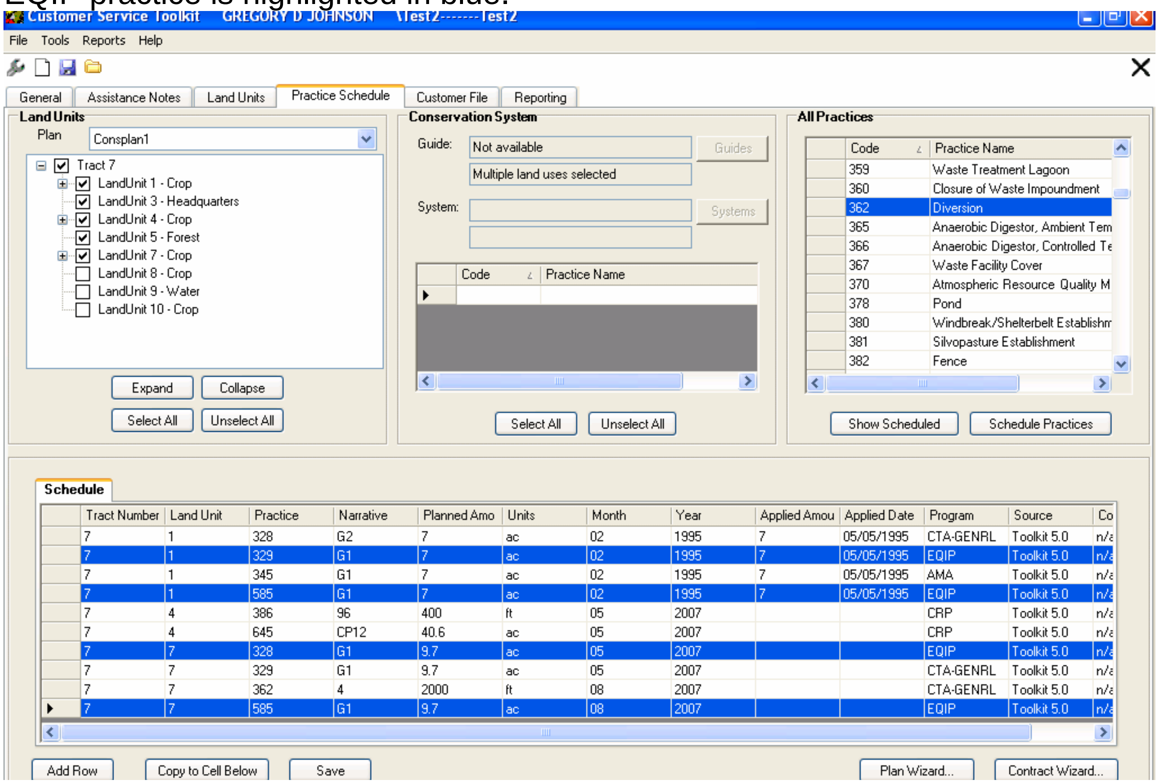
5. Next, click the **Practice Schedule** tab to change any information for the current fields.

6. To edit a practice in the practice schedule, select the row in the schedule you wish to edit. The selected row will be highlighted.

7. Click inside each cell to make your changes. Drop down lists are available after clicking in many of the individual cells. You may make changes to individual cells as follows.
    d. **Tract Number**: select the tract number from the choice list.
    e. **Land Unit**: select the land unit from the choice list.
    f. **Practice**: select a new practice code from the choice list.
    g. **Narrative**: click on the small button on the right side of the narrative cell to open the Practice Narrative window. Choose a narrative by clicking on the shaded area to the left of the desired narrative. In addition, you may modify the text of the chosen narrative for a single practice record by editing the narrative in the **Custom Narrative** frame. When finished, click **OK**.
    h. **Planned Amount**: modify the planned amount as needed.
    i. **Units**: this field is populated automatically; it is not an editable field.
    j. **Month**: select the planned month from the choice list.
    k. **Year**: enter the planned year.
    l. Recurring Practices may be planned by clicking on the small **R** icon to the right of the planned year. A Recurring Practice dialog window will open. Choose the **Start** and **End** years from the drop down choice lists. Select an Interval by clicking on **Annual** or **Bi-Annual**. Click **OK**. The letter **R** is appended to the planned year indicating it is a recurring practice.
    m. **Applied Amount**: modify the applied amount, as needed.
    n. **Applied Date**: modify the applied date, as needed.
    o. **Program**: select a program from the choice list. If you do not select a program, CTA-General will automatically become the program.
    p. **Source**: this field is populated automatically; it is not an editable field.
    q. Once you are finished making changes to the practice schedule, click **Save**.
    r. To continue with the plan revision exit the practice schedule, click another customer tab or closing the folder, or you may develop a plan or contract documents using the Plan Wizard and/or Contact Wizard.
8. Add appropriate information to the Assistance Notes, specifically discussing such topics as the reason for the revision to the plan.

2. When creating a new customer, how to include all programs in one practice schedule

1. The Customer must be checked out on your **C: drive**.
2. Go to the **Customer Folder** tab, create a new project, and create a new planned land unit layer. Next, attribute the planned land unit layer (field numbers, land use, etc.) and **Save** the project.
3. Go to **Practice Schedule** tab
4. Add all conservation practices. In the Program column select the appropriate program for each practice. See example below where each EQIP practice is highlighted in blue.



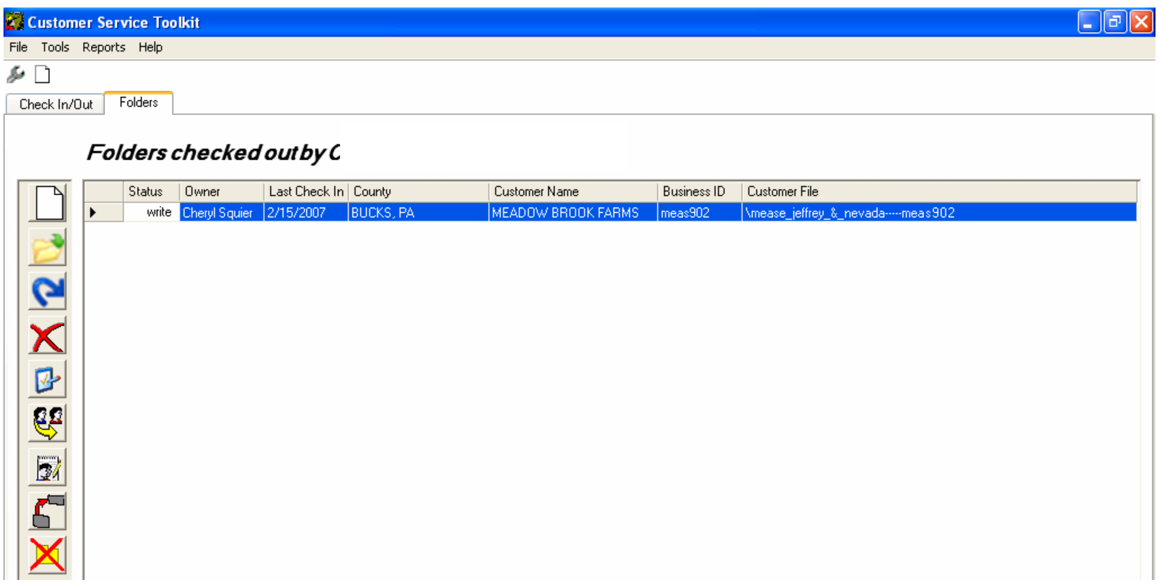
5. When all the practices are selected that you need to create a particular plan/contract, you can click on either the **Plan Wizard** command button, or the **Contract Wizard** command button. Note, you do not have to have all practices selected; only the practices you need for a particular plan report or contract. You can also create more than one plan report and more than one contract from this practice schedule.
6. If another resource person, such as the grazing specialist, needs to add to the practice schedule, check the customer back into the NCPDB. The grazing specialist can then check the customer out and add grazing practices to the same practice schedule. **Important: The other resource person does not create a new planned land unit. Any additional practices would be added in the existing practice schedule and map (project).** The grazing specialist can even make a special map (*.pdf) to save in the customer folder, that provides a more detailed view of the grazing practices. This allows the owner/operator to readily see what has been agreed upon.

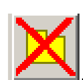
3. Delete a Plan from the NCPDB

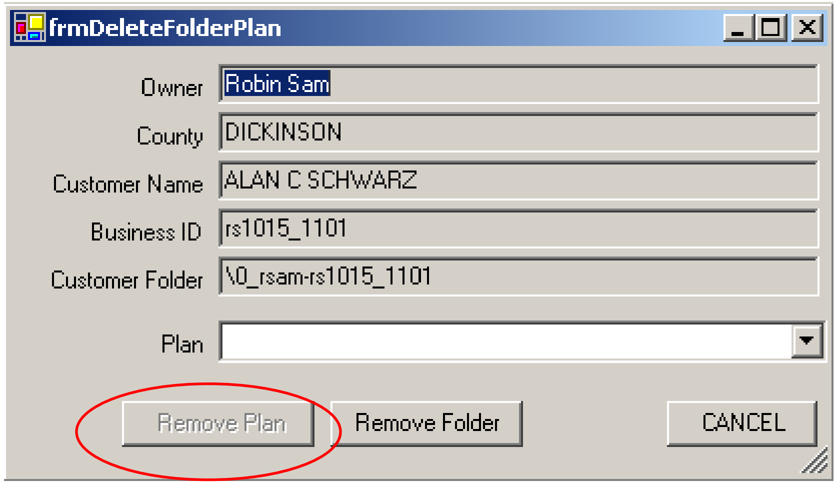
If a customer file contains an old plan that is no longer viable, the old plan needs to be deleted from the NCPDB. This plan includes the practice schedule and associated planned land unit layer. The plan could also be a duplicate plan in the customer's folder. ***Note: The plan to be deleted cannot be in a current contract!***

To **permanently** delete a customer plan from the NCPDB and your local **c:** drive, complete the following steps.

1. The Customer must be checked out on your c: drive.
2. Click the **Folders** tab.
3. Highlight the customer folder that you wish to delete the plan.



4. Click the **Delete Folders or Plans** icon .
5. Select **Remove Plan** (See dialog box below).
   - If you have more than one plan, select the plan from the drop-down list and click **Remove Plan**.
6. You are prompted as to whether or not you want to remove the plan or folder. Click **Remove Plan** to remove it. Click **Cancel** to exit.



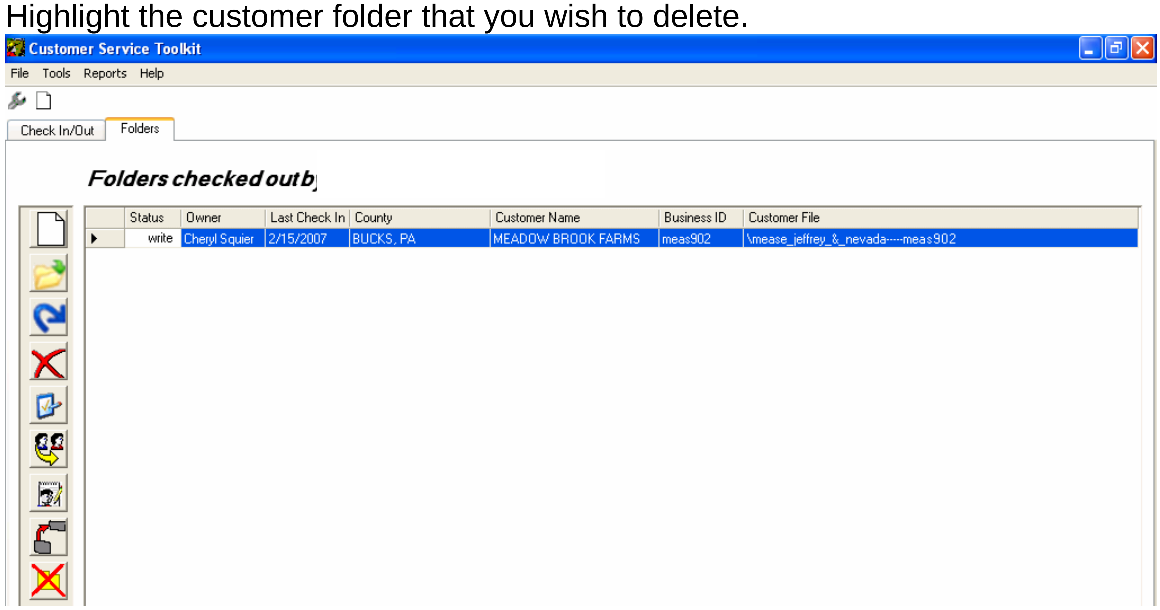
4. Delete a Folder from the NCPDB

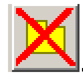
If you have multiple customer folders for a customer, with each containing the same information, and you need to delete one or more of these customer folders, follow the instructions below.

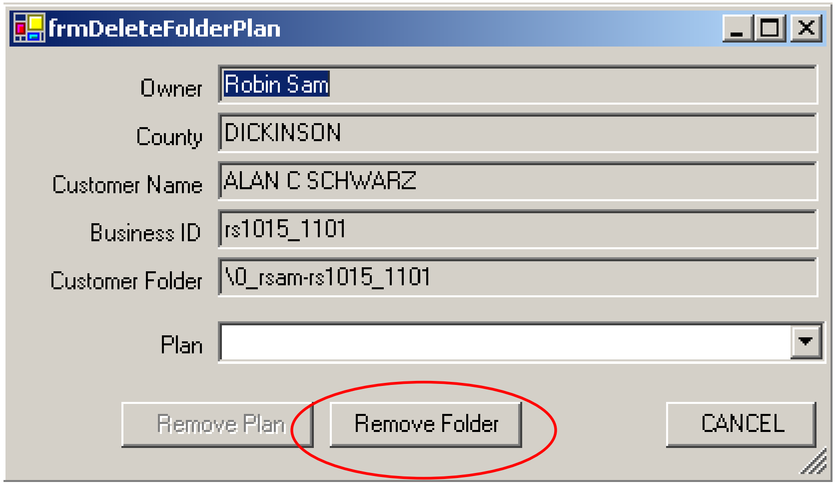
If a customer has sold the property to another, the folder can be renamed using the new RENAME FOLDER button in the folders tab (see ….).

To **permanently** delete a customer folder from the NCPDB and your local **c:** drive, complete the following steps.

1. The Customer must be checked out on your c: drive.
2. Click the **Folders** tab.
3. Highlight the customer folder that you wish to delete.



4. Click the **Delete Folders or Plans** icon .
5. Select **Remove Folder** (See dialog box below).



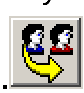
6. You are prompted as to whether or not you want to remove the plan or folder. Click **Remove Folder** to remove it. Click **Cancel** to exit.

5. Rename a Customer Folder

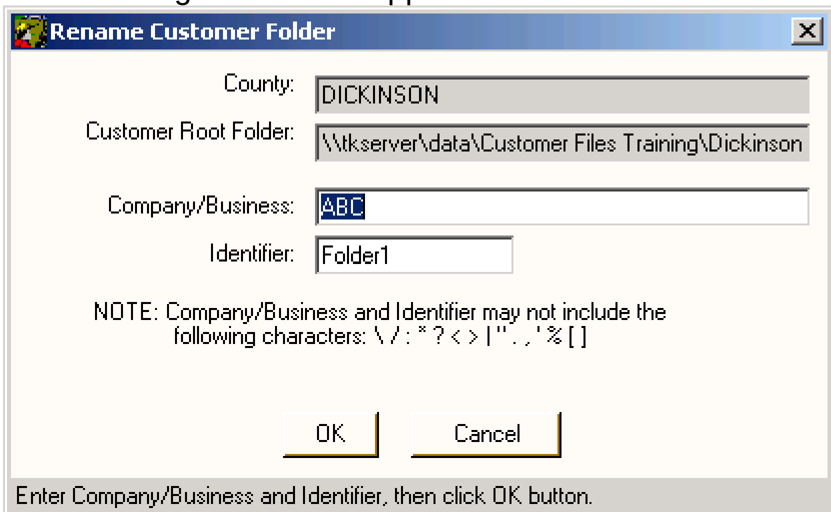
With Toolkit SP-3, a new feature is available on the Folders Tab that allows users to rename the customer folder.

The Rename Customer Folder feature allows you to rename the Customer/Business Name, the Business ID, or both. The customer folder needs to be checked out of the NCPDB before the feature can be used to change the name of the customer file.

To access this feature, go to the Folders tab.

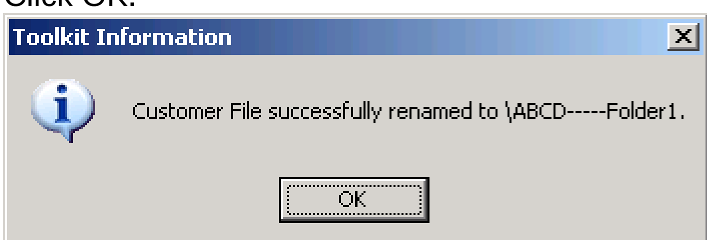
1. On the Folders tabs, highlight the customer that you wish to rename.
2. Click on the Rename Customer Folder button.

3. The following window will appear.



You may rename the Company/Business name, the Identify, or both.

4. Enter the new Company/Business name (if you wish to change it). Avoid using the special characters identified on the Rename Customer Folder screen.
5. Enter the new business ID in the Identifier field (if you wish to change it).
6. Click OK.



7. Toolkit will change the name of (1) the customer folder on the NCPDB, and (2) the Customer File on your local server.

Note: The Business ID must be unique within each county. Toolkit will provide a warning notifying you to enter a different Business ID if the Business ID you typed in is already in use for that county.

6. Rename a Plan

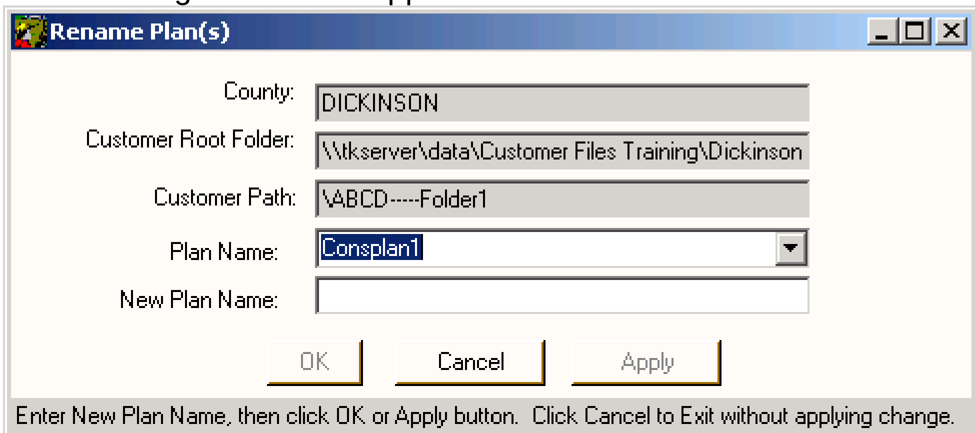
SP-3 has a new feature for renaming plans in a checked out folder.

The Rename Plan feature allows you to rename a plan in a specific customer folder. The customer folder needs to be checked out of the NCPDB before the feature can be used to change the name of the customer file.

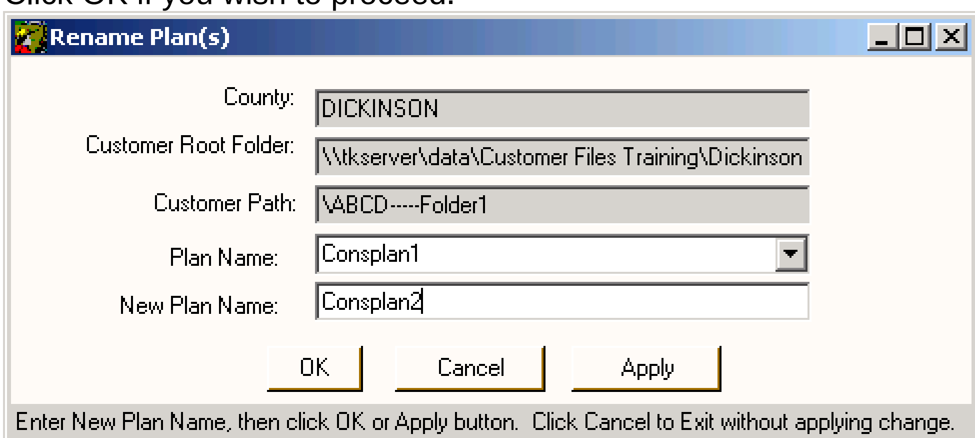
To access this feature, go to the Folders tab.

1. On the Folders tabs, highlight the customer that you wish to rename.
2. Click on the Rename Plan(s) button. 

3. The following window will appear.



4. Select the Plan from the Plan Name drop-down list. If only one plan resides in this customer folder, the name of this plan will be automatically entered for you.
5. Enter the new name for this plan in the New Plan Name field.
8. Click OK if you wish to proceed.



9. Click Cancel to exit without applying the change.